



Bonuses



USAFMCOM OPERATIONAL SUPPORT TEAM







- **■** Enlistment Bonus
- **■** Selective Reenlistment Bonus
- **#** Career Status Bonus / REDUX



Enlistment Bonus

- # Enlists in the Armed Forces of the United States
- #2 years or more for the purpose of qualifying and
- **#** Serving in a military specialty designated as critical







- ♯ Prescribed by the Secretary of the Military Department
- **No more then \$40,000**
- **■** Initial payment no more then \$10,000
 - The remaining portion to be paid in annual installments

Effect of MMPA Posting



- ★The Selective Enlistment Bonus
 (SEB) is posted to the MMPA by
 processing a 3403 transaction. The
 3403 Transaction will create the
 following entries on the MMPA:
 - 34 Initial Installment (will not exceed \$10,000.00)
 - R8 Identifies all pertinent data concerning SEB





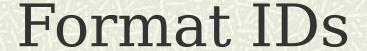


R8 SEB* ENTRY-OPEN-DT 980122 96 01 2 CNTRL-CODE 0 AMT-ANL-PAYMT 3,000.00 ENTLMT 3,000.00 PD-TO-DATE 3,000.00 SRB-INSTLMT-NR 1

Field Descriptions

AMT-ANL-PAYMT (PAAL) - Amount of annual SEB payment entitlement.
ENTLMT (ENTC) - The total amount of SEB authorized.
PD-TO-DATE (PAAK) - Total amount of SEB paid to date.
SEB-INSTLMNT-NR (INNG) - The number of SEB installments paid.







#34

- Future code R indicates date of next installment.
- (Prompts system to pay any additional amount over the \$10,000.00 initial payment on the next update)
- NOTE: All future payments for the Army currently must be processed manually.
- Future code Z identifies contract completion date. (Prompts system to close R8)







#PL

- Payment authorization (prompts system to issue an EFT payment on the next update.
- The EFT disbursing system will generate a
 PL03 transaction with the voucher number of payment issued.
- This will close the PL entry.







#FJ

- One Time Federal tax adjustment shows how bonus affected member's taxable wages and withholdings.
- These amounts are included in the members YTD tax totals.
- NOTE: All enlistment bonuses are subject to one time deduction of 25% FITW.



Format IDs



#FK

- One Time State tax adjustment shows how bonus affected member's taxable wages and withholdings
- These amounts are included in the members YTD tax totals.
- NOTE: All enlistment bonuses are subject to a one time payment deduction amount for the state as designated on the pay account.







#N9

For bonus that are old and are processed late DFAS will post a N9 memo stating how the bonus will be paid out.







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R8 SEB* ENTRY-OPEN-DT 050815 16 08 2 CNTRL-CODE 0 AMT-ANL-PAYMT 2,333.33
                    PD-TO-DATE 7,000.00 SRB-INSTLMT-NR 1
34-SEB* ENTRY-OPEN-DT 050815 16 08 2
                                      ENTRY-CLSD-DT 050815 16 08 2
               ACTN 03 START 050711 ENTLMT 7,000.00
   CNTRL-CODE 2
FJ-FED WHLDG* ENTRY-OPEN-DT 050815 16 08 2
                                           ENTRY-CLSD-DT 050815 16 08 2
   CNTRL-CODE 2 START 0507 1-TI-DEDTN 1,750.00 1-TI-WAGES 7,000.00
  DEDTN-ELECTN M CZTE-IND N CZTE-AMT 0.00 TAX-YEAR 05
                                             ENTRY-CLSD-DT 050815 16 08 2
FK-STATE WHLDG* ENTRY-OPEN-DT 050815
   CNTRL-CODE 2 START 0507 1-TI-DEDTN
                                      350.00 1-TI-WAGES 7,000.00
   DEDTN-ELECTN M CZTE-IND N CZTE-AMT 0.00 STATE-ID 31 TAX-YEAR 05
        ENTRY-OPEN-DT 050815 16 08 2 ENTRY-CLSD-DT 050816 17 08 2
                DATE-VOU 050816 1-TI-PAY
 COMPTR-PAY-COND 2 VOII-NR KA650306 GOVT-AGENCY A ADSN 3800
```



Required Documents

- # DD 4-1
- # DD 4-2
- **#** DD 4-3
- **#**Appendix B
- #Appendix A
- # Completion of AIT (certificate or MOS Orders)



Selective Reenlistment Bonus

- ➡ The MOS designated for the SRB program will be announced by message from HRC-Alexandria
- The SRB program is a retention incentive paid to soldiers in certain selected MOSs who reenlist for a minimum of 3 years.







- **#** Payments of up to \$45,000.00
- **♯** Soldiers may be paid bonuses up to six times their monthly basic pay at discharge, times the number of years of additional obligated service, or \$20,000.00, whichever is less.
- **♯** Soldiers reenlisting for Indefinite Status will not be paid a SRB







- # All re-enlistments and extensions are processed through Retention.
- The E603 will be processed by Army Retention



Effect of MMPA Posting

★ The Selective Reenlistment Bonus (SRB) is posted to the MMPA by processing either a 3303 or an E603 transaction. The 3303 and E603 transactions will create the following entries on the MMPA:







#33

Initial Installment







#R7

- Identifies all pertinent data about SRB
- Creates a history entry.







#33

- Future code T, B or C (zone level) indicates date next installment is due.
- Prompts system to pay next installment in that zone
- Future code Z identifies contract completion date.
- prompts system to close R7





#PL

Processing 3303 or 9903 (33) will prompt the system to issue an EFT payment systemically for bonus entitlement with a PL transaction.







#PQ

Payment authorization (E603) Normally generates a PQ03 to be processed and paid on JPBB system by Servicing Finance Office. When JPBB is used, payment will be processed as an EFT transaction and the PQ03 will systemically update with a voucher number and date and close the open PQ.







#FJ

- One Time Federal tax adjustment shows how bonus affected member's taxable wages and withholdings.
- These amounts are included in the members YTD tax totals.
- Current FITW deduction member reenlists while in a combat zone.
 - If officer re-enlist any amount over SMA plus \$225 is taxable.







#FK

- One Time State tax adjustment shows how bonus affected member's taxable wages and withholdings.
- These amounts are included in the members YTD tax totals.
- Rate of state tax on one time payments are determined by the state member is claiming for residency purposes.
- Bonus is exempt from state withholding if member re-enlists in a zone designated for tax exemption.







E603 generated R7 Transaction with PQ/FJ/FK Tax entries

R7 SRB* ENTRY-OPEN-DT 060217 17 02 2 CNTRL-CODE 0 AMT-ANL-PAYMT 3,301.96
ENTLHT 19,811.80 PD-TO-DATE 9,905.90 SRB-INSTLMT-NR 1 SRB-MULTR 4.0
SRB-BONUS-TYPE A TOTAL-DAYS-SRB-PD 1020 RRB/SRB-TAX-XCLUSN-ID 1 DOE
060209 FY 06 AMT-INSTLMT-PMT 9,905.90

PQ SEPTN PAY* ENTRY-OPEN-DT 060217 17 02 2 CNTRL-CODE 0 1-TI-PAY-AUTH 060209 AMT-1-TI-PAY 7.033.19 ADSN 6583

FJ-FED WHLDG* ENTRY-OPEN-DT 060217 17 02 2 ENTRY-CLSD-DT 060217 17 02 2 CNTRL-CODE 2 START 0602 1-TI-DEDTN 2,476.48 1-TI-WAGES 9,905.90 DEDTN-ELECTN S CZTE-IND N CZTE-AMT 0.00 TAX-YEAR 06

FK-STATE WHLDG* ENTRY-OPEN-DT 060217 17 02 2 ENTRY-CLSD-DT 060217 17 02 CNTRL-CODE 2 START 0602 1-TI-DEDTN 396.23 1-TI-WAGES 9,905.90 DEDTN-ELECTN S CZTE-IND N CZTE-AMT 0.00 STATE-ID 13 TAX-YEAR 06 33 ENTLMT-FUTR T EFF-DATE 070130 33 ENTLMT-FUTR Z EFF-DATE 100208

R7 SRB Field Descriptions

AMT-ANL-PAYMT (PAAL) - Amount of annual SRB payment.

ENTLMT (ENTC) - The total amount of SRB.

PD-TO-DATE (PAAK) - Total amount of SRB that has been paid to date.

SRB-INSTLMT-NR (INNF) - Number of SRB installments paid.

SRB-MULTR (SERB) - The award level of SRB specialty.

SRB-BONUS-TYPE (SERT) - SRB zone type A, B, or C.

TOTAL-DAYS-SRB-PD (DAIJ) - Total number of days SRB was paid for.

RRB/SRB-TAX-XCLUSN-ID (INKG) - SRB tax exclusion indicator:

1 is taxable, 2 is nontaxable

DOE (DACB) - Enlistment date member received SRB for

FY (YEAB) - Fiscal year of SRB installment

AMT-INSTLMT-PMT (PAAO) - The amount of SRB installment paid.



Career Status Bon

➡ A member who entered the service after July 31, 1986 will be given a choice of retirement plans at their 15th year of service.







- 1. High-3 Year Average System which basically calculates retirement pay at 2.5% per year on active duty
- 2. REDUX \$30,000 Career Status Bonus (CSB) payment.
- Members will then be eligible for retirement after 20 years of service with a reduction to a 2.0 percentage for retirement.







♯ All active duty members are eligible: enlisted, warrant officers and commissioned officers. To be eligible for the CSB/REDUX election, members must meet the following conditions:







- #1. Is currently serving on active duty.
- #2. First became a member of a Uniformed Service on or after August 1, 1986, determined by the
- **#**3. Has completed 15 years total active military service.
- #4. Is otherwise eligible, as determined by the Secretary of the Military Service concerned to serve continuously on active duty until the completion of 20 years.







- Secretary of the Military
 Department will notify all
 members with DIEMS of Aug 1,
 1986 or later
- Notification Letter will be sent on or before the date the soldier completes 14 years and 6 months







- **♯** Must submit Career Status Bonus Election (DD 2839)
- **#** Submission of forms must be NLT the soldier attains 15 years
- #6 months after notification is received
 - Which ever is later







- **♯** Lump Sum Payment
 - **\$30,000**
- **♯** Payments by Installment
 - One payment of \$30,000;
 - Two annual installments of \$15,000 each;
 - Three annual installments of \$10,000 each;
 - Four annual installments of \$7,500 each; or
 - Five annual installments of \$6,000 each.
 - Initial payment of CSB cannot be paid earlier than the date the member attained 15 years of total active service.







- #The CSB is considered as taxable income at the time the payment is actually made to the member.
- ★The CSB/REDUX is considered tax exempt income if the member and is entitled to combat zone tax exclusion on date eligibility is reached, and has signed and dated a DD 2839 on or before actual date that eligibility is reached.



Taxes



- ➡If notification was delayed, and member signed for bonus at a later date, then tax exclusion will apply if soldier was in the combat zone on date DD 2839 was signed.
- #For Commissioned Officers, the same rules apply.
 - Any amount over the SMA plus \$225 (HFP) will be taxes







9903 entry and PM pay line for Enlisted Career Status Bonus

31-RNLMNT BONUS* ENTRY-OPEN-DT 060204 08 02 1 ENTRY-CLSD-DT 060204 08 02 1 CNTRL-CODE 2 ACTN 03 START 051117 ENTLMT 30,000.00

PM-RNLMNT-PAY* ENTRY-OPEN-DT 060204 08 02 1 ENTRY-CLSD-DT 060207 09 02 1 CNTRL-CODE 2 DATE-VOU 060207 1-TI-PAY-AUTH 051117 AMT-1-TI-PAY 30,000.00 COMPTR-PAY-COND 2 VOU-NR KA650195 GOVT-AGENCY A ADSN 3800







9903 entry and PW pay line for Officer Career Status Bonus

08-NUCLEAR BONUS* ENTRY-OPEN-DT 060204 08 02 1 ENTRY-CLSD-DT 060204 08 02 CNTRL-CODE 2 ACTN 03 START 051114 ENTLMT 30,000.00 NUC-BONUS-TYPE 4

PW-NUCLEAR BONUSES* ENTRY-OPEN-DT 060204 08 02 1 ENTRY-CLSD-DT 060207 09 02 1 CNTRL-CODE 2 DATE-VOU 060207 1-TI-PAY-AUTH 051114 AMT-1-TI-PAY 30,000.00 COMPTR-PAY-COND 2 ENTLMNT-FORMAT 08 VOU-NR KA650195 GOVT-AGENCY A ADSN 3800







Inserted R5 for Career Status Bonus for \$30,000.00

R5 RRB/LAST ENLSTMT* ENTRY-OPEN-DT 060203 07 02 1 CNTRL-CODE 0 DATE-PD 051114 ENTLMT 30,000.00 PD-TO-DATE 30,000.00 RRB-ELCTN 1 RRB-TYPE 0 RRB-NR 7 TOT-DAYS-RRB-PD 1800 LAST-GR-AUTHRZD 00 RRB/SRB-TAX-XCLUSN-ID 2



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DD Form 2829 - Career Status Bonus Election Form (1 of 3)

CAREER STATUS BONUS (CSB) ELECTION (Read instructions before completing form.)							
	PRIVACY	ACT STATEME	NT				
AUTHORITY: 37 U.S.C. 322; E.O. 9397; ASD(FMP) Memorandum dated February 2, 2001, Subject: Career Status Bonus Implementing Guidance.							
PRINCIPAL PURPOSE: To record a member's eligibility and election to receive or not receive the Career Status Bonus with reduced retired pay (REDUX) and to adjust such retired pay according to the member's election.							
ROUTER URSEST: Information may be provided to the Internal Revenue Service to receive matters existing to an individual's tax withholding, to the Faderal Referement Trust investment Board to existable eligibility for contributions to the York Savings Fan Outformed Service personnel, and to the Department of Justice or state and local governments when a question of conflicting interest is raised concerning a member's declarations and election.							
DISCLOSURE: Voluntary; however, failure to provide the requested information by the time instructed by the member's branch of Service could result in an irrevocable determination affecting the amount of refered pay the individual may later qualify to receive and dequalification for electing the Cureer Status Bonus.							
SECTION I - PERSONAL IDENTIFICA	TION (To be comple	sted by Service Offic	cials)				
1. NAME (Last, First, Middle Initial)		2. SSN		3. RANK/P	AY GRADE/BRA	NCH OF SERVICE	
4. DIEMS (YYYYMMOD)		TERMINATION OF A					
SECTION II - DETERMINATION OF I	ELIGIBI LITY (To be	completed by Service	ce Officials	:)			
7. You may be eligible to elect a Cereer Ste (1) Be on active duty, (2) Complete 15 years of active duty se (3) Have a DELBAS of August 1, 1986 or (4) Qualify under Service regulation to Service records indicate that you are current Eligible to elect the Career Status Bon Not eligible to elect the Career Status REASON NOT ELIGIBLE:	vice, later, and retention to 20 years o ly: us.						
	REPRESENTATIVE						
(YYYYMMDD) a. PRINTED	NAME (Last, First, Midd	le Initial)	b. SIGNATURE				
SECTIONS III. IV. or V (To be complete NOTE: Complete only one of these sections if not eligible, complete Section III or if eligible and you want to elect to re if eligible and you do not want to rea	and then return it as inly. Indexerve the bonus, comp	nstructed by your S plete Section IV only	iervice.				
SECTION III - NOT CURRENTLY ELIGIBLE FOR CAREER STATUS BONUS Complete this section only if you are not currently eligible to elect the Career Status Bonus and return the form as instructed by your Service.							
 I understand that I am not eligible for the to retirement if my Service so permits. I und understand that my Service will notify me if 	derstand that I will not	receive a bonus and			igh-3 retirement	system. I	
a. SIGNATURE				b. DATE SIGN	IED (YYYYMMOD)		
11. WITNESS							
a. PRINTED NAME (Last, First, Middle Initial) b. RANK/PAY GRADE c. POSITION/DUTY TITLE							
d. ORGANIZATION o. ORGANIZATIONAL AUDRESS							
f. SIGNATURE	•				g. DATE SIGN	IED (YYYYMMOD)	
DD FORM 2839, SEP 2002	PREVIOUS	EDITION IS OBSOLE	ETE.		Reset	Page 1 of 3 Pages	



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DD Form 2829 - Career Status Bonus Election Form (2 of 3)

SECTION IV - ELIGIBLE AND ELECTING TO RECEIVE THE CAREER STATUS BONUS Complete this section only if you are digible and you desire to elect to receive the Career Status Bonus. Then return the form as instructed by your Survice.							
12. I alext to receive the Careet Status Bonus permission and the statement of 15 years of active darty service and he election is effective it may not be revoked. My elect received and determined occeptable by my Service, understand that if I receive the CSB in error, I must subject to Service regulations, cut if attain a minimal cuplet to Service regulation, such if attain a minimal conditional service I agreed to serve. Any unpeal and odditional service I agreed to serve. Any unpeal and concent to withholding from current pay, rinal pay, or other more of 100% of any current pay, final pay, or other more of the 1500 Minitary Retrement Reform Act (1505 Minitary Retrement Reform Act (1505 Minitary Retrement Pay).	ving been determined eligible for ion is effective once received end but no later than the date that is peay the full, before-tax bones am of 20 years of such service. If is payment in proportion to the a any other money due me to sat any other money due me to sat any other money due me to sat ye due me. I further understand MRPA, known as REDUX, and the duced multiplier before age 62 and both before and after age 62, but the same both before and after age 62, but when the later when the same and the same and the same and the same and the same and both before and after age 62, but the same and after age 62, but the same and after age 62, but when the same and the same and	the bonus by my Service I accepted at the 16th y was monthe after being in mount. I agree to remain 1 fail to complete such in mount of service I failed poyment. If I am separa left this indebtedness. I n, and understand that it that if and when I do reti at my future retired pay, di annual Cost-oft-uring at t with a one-time eatch.	. I understand that once the ser of service, or if later, the date thifted of my eliability. I no continuous active duty, service, I understand that I will be to complete compared to the tech prior to 20 years of service, I understand that I will be the complete compared to the tech prior to 20 years of service, if under the provisions (if based on length of service, will Usquatments (COLAe) that are 1 up COLA adjustment at age 62.				
a. I ELECT TO RECEIVE THE CAREER STATUS BONUS A	S FOLLOWS /X the desired nation:						
11 A SINGLE LUMP SUM PAYMENT OF \$20.000 14 FOUR ANNUAL PAYMENTS OF \$7.500							
(2) TWO ANNUAL PAYMENTS OF \$15,000		IUAL PAYMENTS OF \$6,00					
	(5) FIVE ANI	IUAL PAYMENTS OF 56,00					
(3) THREE ANNUAL PAYMENTS OF \$10,000							
NOTE: When multiple payments are to be made, the	second and later payments are n	nade in January of each					
b. SIGNATURE			c. DATE SIGNED (YYYYMMDD)				
13. WITNESS							
a. PRINTED NAME (Last, First, Middle Initial)	b. RANK/PAY GRADE	c. POSITION/DUTY TITLE					
d. ORGANIZATION	ORGANIZATIONAL ADDRESS						
f. SIGNATURE			g. DATE SIGNED (YYYYMMDD)				
			-				
SECTION V - ELIGIBLE AND ELECTING NOT TO RECEIVE THE CAREER STATUS BONUS							
Complete this section only if you are eligible to receive the Career Status Bonus but you desire NOT to elect the bonus. Then return the form as instructed by your Service.							
14. I elect not to receive the Career Status Bonus u is effective it may not be revoked. My election is ef received and determined acceptable by my Service, understand that I will not have any further opportunithat I remain under the High-3 or teirement a yettem. I explaining the details and effects of making this elec-	ective once received and accepts but no later than the date that is a ty to elect to receive this bonus. have received the Fact Sheet of Ir	ed at the 15th year of se six months after being no I understand that I will r	rvice, or if later, the date stifled of my eligibility. I not receive a bonus payment and				
a. SIGNATURE	b. DATE SIGNED (YYYYMMOD)						
15. WITNESS			1				
a. PRINTED NAME (Last, First, Middle Initial)	b. RANK/PAY GRADE	c. POSITION/DUTY TITLE					
		e. Positionidal Title					
d. ORGANIZATION	ORGANIZATIONAL ADDRESS						
f, SIGNATURE		g. DATE SIGNED (VYVYMMDD)					
SECTION VI - SERVICE RECORDING OF E	LECTION						
(To be completed by Service Officials after member	makes an election to receive the l	benus)					
16. CSB ELECTION EFFECTIVE DATE (YYYYMMOD)							
17. RECORDING OFFICIAL							
a. PRINTED NAME (Last, First, Middle Initial)	b. RANK/PAY GRADE	c. POSITION/DUTY TITLE					
d. ORGANIZATION	e. ORGANIZATIONAL ADDRESS						
f. SIGNATURE			g. DATE SIGNED (YYYYMMDD)				
DD FORM 2839 (BACK), SEP 2002			Reset Page 2 of 3 Pages				



DD Form 2839 Instructions)



DD Form 2829 - Career Status Bonus Election Form (3 of 3)

INSTRUCTIONS FOR COMPLETING DD FORM 2839, CAREER STATUS BONUS (CSB) ELECTION

GLOSSARY

CSB Election Effective Date: This is the date the member's election to receive a Career Status Brous becomes irrevocable. This is the date the election is received and accepted at the 15th year of service, or if later, the date received and dotermined acceptable by the Service concerned, but no later than the date that is six months after the member is notified of eligibility for the Career Status Brous.

Date of CSB Notification: This is the date the Service processed the notification to the member. The Service should record this date in Section I, Item 6 of the form as this date may determine the effective date of an election.

Date for Determination of Active Duty Service Completed: This is the date used by the Service to compute the number of years of active duty service of a member. The terminology for this varies by Branch of Service.

Date of Initial Entry to Military Service for Date of Initial Entry to Uniformed Service. This date is referred to as the DIEMS or the DIEMS. Other accoryma or terms may be used in other Branches of Service. This is the date someone first became a member of a Uniformed Service and pertains to the earliest date of entilstent, induction, or appointment in a regular or reserve component of a Uniformed Service as a commissioned officer, warrant officer, or entilstend member. Breaks in service shall not affect the date someone first became a member. Cadeta and midalipmen of the Academies, cadets of the Reserve Officer Training Corps, and members of the Delayed Entry Program (DEP) are considered to have become members for the purposes of those provisions. All members about be informed of the implications of these provisions on their potential retired pay.

OENEDA

Service Personnel Officials: Complete Sections I, II, and VI as appropriate to member being notified.

Member: Complete only Section III, IV, or V, as appropriate to your situation.

- 1. Read these instructions carefully before completing the form.
- This form will record your election to receive a Career Status Bonus. Your election will carry Service obligation requirements and affect your future retired pay.
- 3. If eligible to elect the Career Status Bonus, your Service must furnish you a copy of the fact sheet: Information for Members Eligible to Roceive a Career Status Bonus explaining the details and effects of making your election to receive or not to receive the bonus. You should read this fact sheet and consult other sources if desired.

SECTION I: To be completed by Service Officials.

Self-explanatory. Obtain from Service personnel records.

SECTION II: To be completed by Service Officials.

Item 7. This item is to be completed by Service officials and provided to the member on or about the time of completing 14 years and 6 months of active service.

Member: If this item is not completed, obtain a determination from your personnel office.

SECTIONS III, IV and V: To be completed by Member.

Complete only the one section appropriate for your situation. Sign and date the form in the appropriate blocks for the applicable section. Have your signature witnessed as instructed by your Service.

SECTION III: Not Currently Eligible for Career Status Bonus.

Complete Section III only if you have been determined currently not eligible to elect the bonus.

SECTION IV: Eligible and Electing to Receive the Career Status Bonus.

Complete Section IV only if you are eligible and desire to receive the bonus with associated reductions in future retired pay, and you agree to remain on active duty for a minimum of 20 years.

SECTION V: Eligible and Electing NOT to Receive the Career Status Bonus.

Complete Section V only if you are eligible but desire NOT to receive the bonus with associated reductions in retired pay.

SECTION VI: Service Recording of Election.

This section is to be completed by Service officials if the member elects to receive the CSB. If the member was not eligible for the bonus or was eligible but did not elect the bonus, leave this section blank.

DD FORM 2839 (INSTRUCTIONS), SEP 2002

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